Software Help Sheet 6: Building a Home Delivered Meal Route in SAMS

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What is a Route?

Routes are lists of consumers that users can arrange in any order. Routes are most commonly used to organize and record driving routes for Home Delivered Meals.

SAMS creates lists of consumers for *Routes* using route filters. You can also manually add consumers to routes. Change the order of consumers on the list by using special toolbar icons. SAMS offers several printing options, including *Daily* and *Weekly* route printouts

SAMS also includes a route printout that includes meal delivery information, and a consumer suspension system that may be used to suspend consumer service deliveries, and routes.

Using Routes in SAMS is a four step process:

1) Creating a *Route Definition*

2) Refreshing the Route

3) Moving, Adding and Removing Consumers

4) Printing the Route

Creating Routes

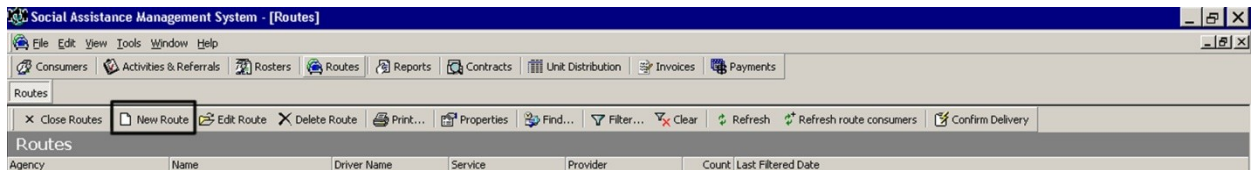## Step One: Creating a Route Definition

This step involves telling SAMS who should appear on the Route.

Hint: Once a Route definition has been built, you may use it over and over again. Simply refresh or add new Consumers.

1. In SAMS, Press the **Routes** button.

2. Once into the Routes area, press the **New Route** button.

3. The New Route screen looks like the screen below. As mentioned before, this screen is where you define *who should appear on the Route*.   This screen is commonly called the Route Filter screen.   *Hint: Use as few Filters as possible to build your Routes.*

The Route screen below shows (in yellow) the fields that must be filled in the first time that you use your Routes. The next few pages have a detailed explanation of each of the fields involved.

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Untitled - Route

Route	
Name	
Driver Name	
Van No.	
Agency	Los Angeles County AAA
Provider	
Subprovider	
Site	
Service	
Place of Service	
Subservice	
General Filters	
Town of Residence	(All)
ZIP Code	(All)
County	(All)
Municipality	(All)
Default Agency	(All)
Default Provider	(All)
Consumer Provider	(All)
Consumer Fund Identifier	(All)
Include Inactive Consumers	No
Service Filters	
Based On	(Any)
Care Program	(All)
Service	(All)
Subservice	(All)
Provider	(All)
Subprovider	(All)
Fund Identifier	(All)
Site	(All)
Status	(All)
Start Date	
End Date	

1. The *Name* Field

The Name field is simply used for naming your Route so that you may find it on the list later. We recommend that you put your Provider name in front of every Route definition.

Name		Fill in the Route Name Here

2. The *Agency* Field

The *Agency* field should always be filled in with *Los Angeles County AAA*, as shown below.

Agency	Los Angeles County AAA

3. The *Provider* Field

The *Provider* field should show your Provider name. Choose your Provider name from the dropdown list.

4. The *Service* Field

Each Route must have a *Service*. You will choose one Home Delivered Meal Service in this field, even if you are delivering more than one meal type on this Route.

5. The *Municipality* Field

Every Consumer that you expect to appear on the Route should have a Municipality defined in their Consumer record.
The Municipality designation is in the *Residential Address* section of the Consumer record. The Municipality equals the Route number you expect the Consumer to appear on. Choose the Municipality / Route Number on this screen.
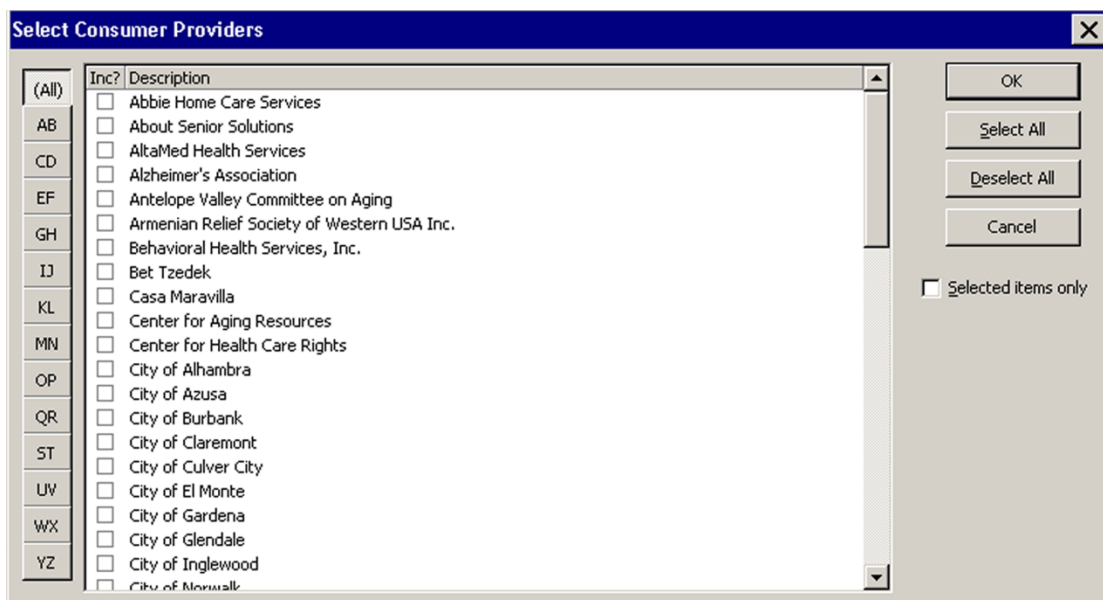

6.   The *Consumer Provider* Field

Every Consumer that you expect to appear on the Route should have a Provider defined in their Consumer record.
The *Consumer Provider* field should show your Provider name. Choose your Provider name from the list.

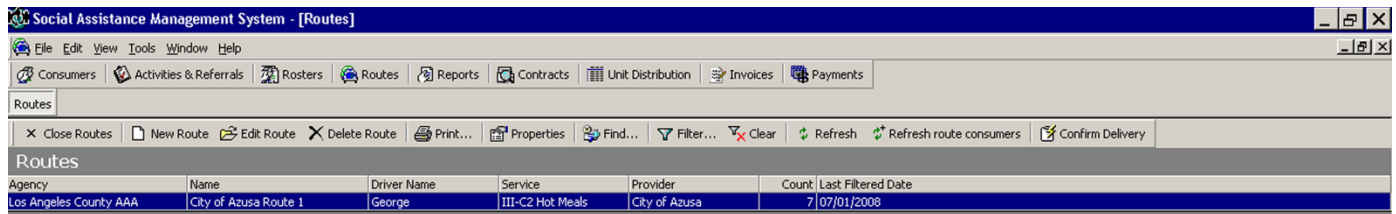

Step Two: Refreshing the Route

Note: You should complete this step each time before you print a Route.

After you have built your Route Definition in Step One, the next step is to Refresh the Route so that it pulls on all new Consumers.
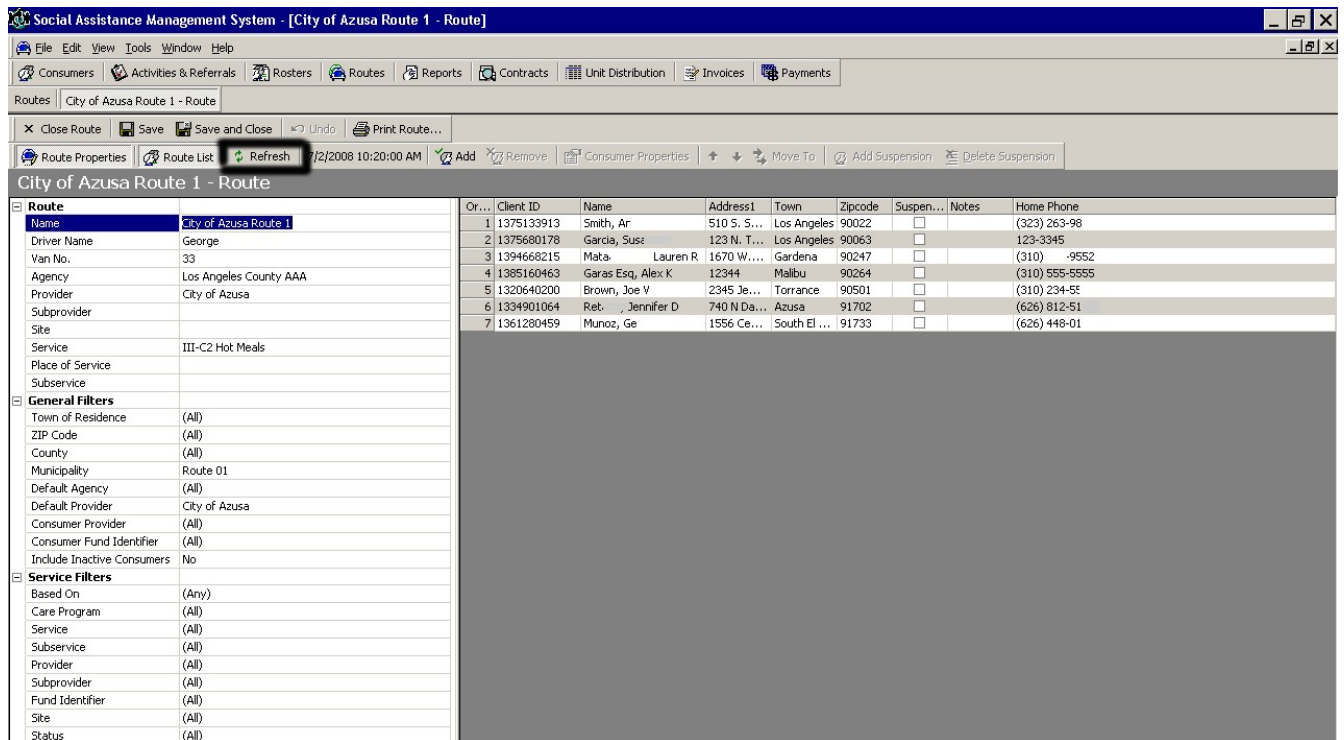
1. In SAMS, Press the **Routes** button.

2. Highlight the Route you wish to refresh and double-click to open it.
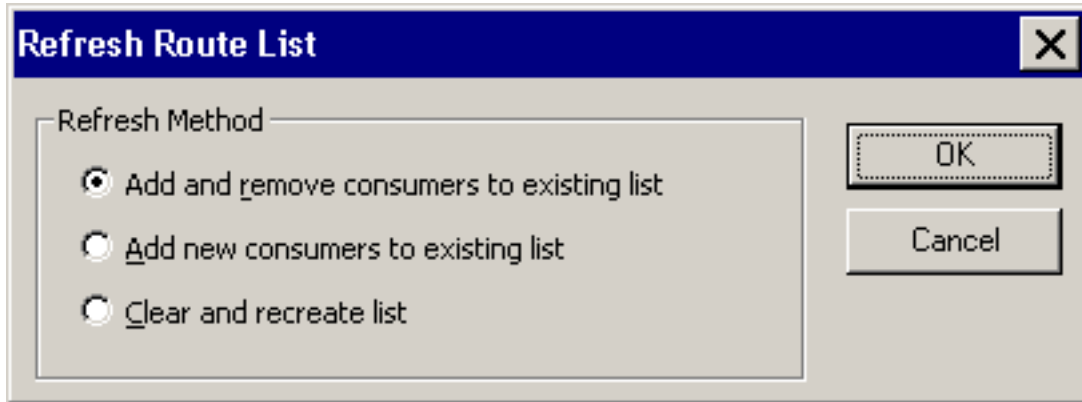

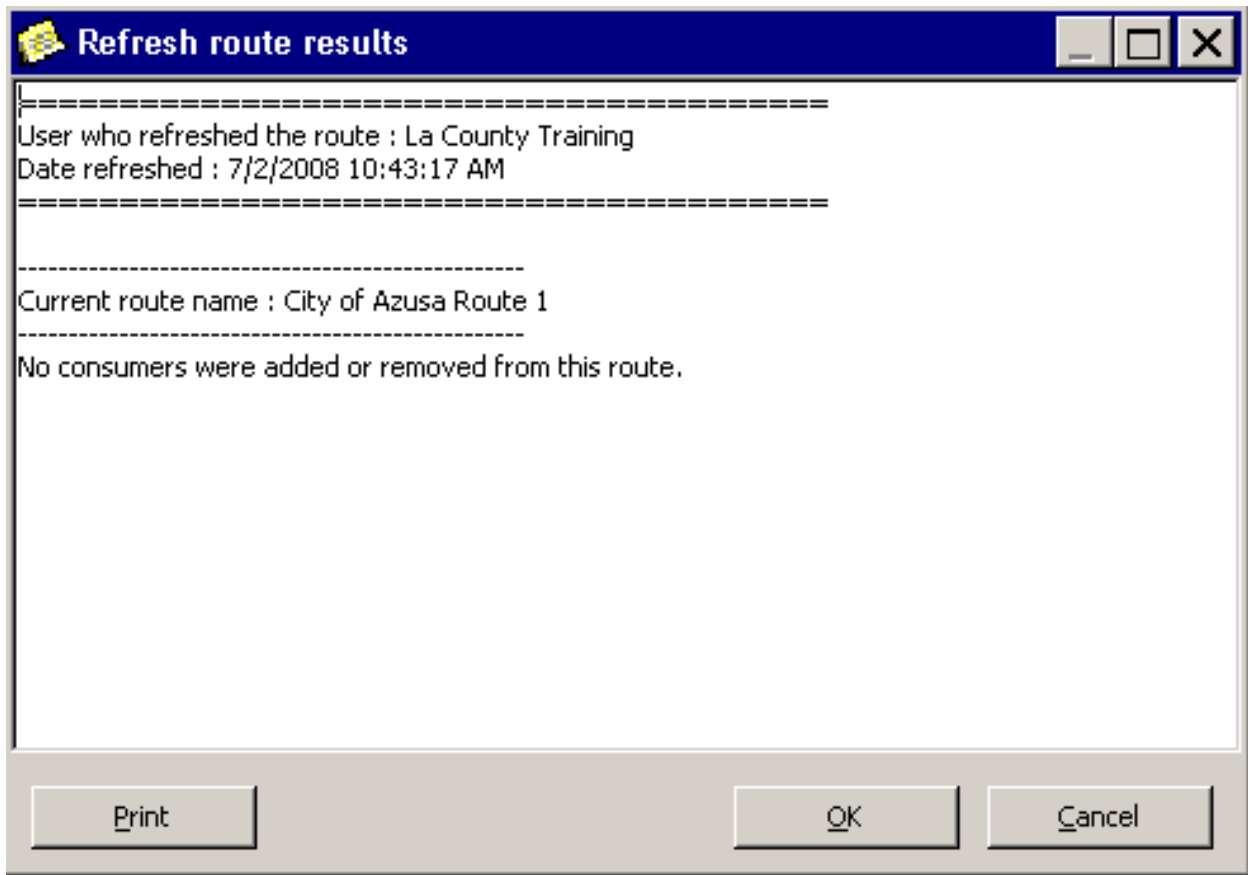3. Once the Route Filter screen is open, click the **Refresh** button

4. In the next window, choose the Refresh Method. The first choice (Add and remove consumers to existing list) is the most common choice to manage Consumers on a Route. This choice will add and remove consumers as they meet the filter criteria that you have set on the Route.

Note: Be very careful here. The *Clear and recreate list* option will clear the list and you will have to reorder all Consumers again.

5. After you click the "O.K." button, SAMS will display the "Refresh Route Results" window that shows what took place during the Refresh process. You may choose to Print this window, or simply click "O.K." to move past it.

Step Three: Adding, Removing, Moving and Suspending Consumers

Now that the Route has been refreshed, you are ready to *move, add and delete* Consumers as needed.

The refresh step should have added and removed Consumers based on your filters. However, you may manually add and remove Consumers from the Route list as you see fit.

- ### Adding Consumers

Click the "Add" button to add any Consumers that you wish.

- ### Removing Consumers

Click the "Remove" button to add any Consumers that you wish.

- ### Moving Consumers

As you know, in a Home Delivered Meal Route, it is imperative that the Consumers are listed in the order that the Route will be driven.

The Consumer list on the right-hand side of this screen is where you change the order of the Route.
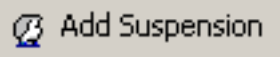
Simply highlight the consumer you wish to move on the list, and use one of the buttons below to move them around until the list is in order.
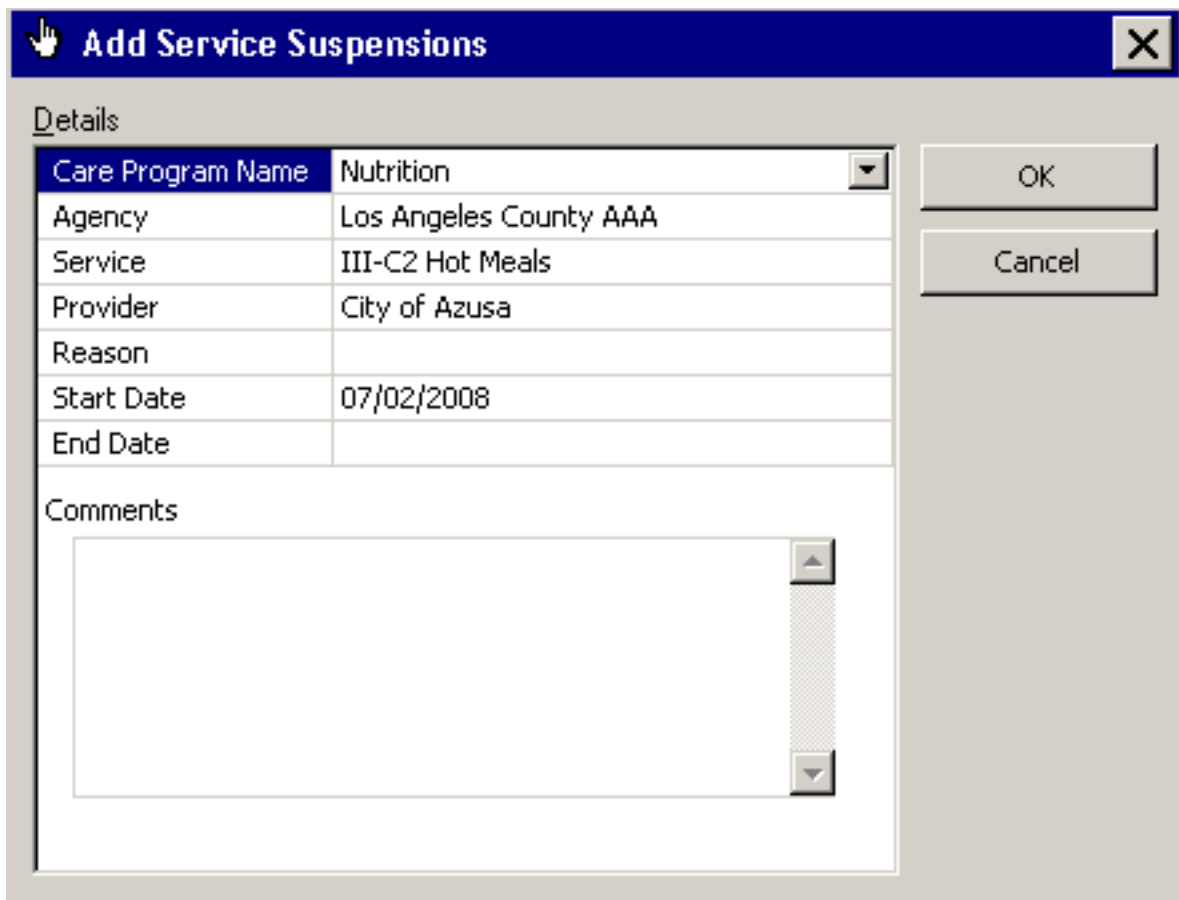
- **Suspending Consumers**

A Consumer may be temporarily suspended from a Route. If you know the Consumer will be away from home, or not receiving a meal for any reason, Suspensions make it easy to manage these situations.

To suspend a Consumer:

a) Highlight the Consumers name on the Route list.

b) Click the "Add Suspension" button. Add Suspension

c) Fill in the Add Service Suspensions screen. The key fields on this screen are the Reason, the Start date and the End date.

Add Service Suspensions ✕

Details

| Care Program Name | Nutrition ▼ | | OK |
Agency	Los Angeles County AAA		
Service	III-C2 Hot Meals		Cancel
Provider	City of Azusa		
Reason			
Start Date	07/02/2008		
End Date			

Comments

d) When you are through filling in the information, press the "O.K." button.

Deleting Suspensions:

Note: You should only delete a Suspension if you made a mistake.

    a)   Highlight the Consumers name on the Route list.

    b)   Click the "Delete Suspension" button.   ⊠ Delete Suspension
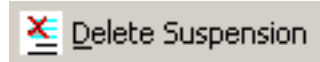
Editing Suspensions:

    a)   Highlight the Consumers name on the Route list.

    b)   Click the "Edit Suspension" button.   🔄 Edit Suspension

    c)   Make your edits as needed.

After the Route list appears as you want it to, press the "Save" button in the toolbar.

    💾 Save

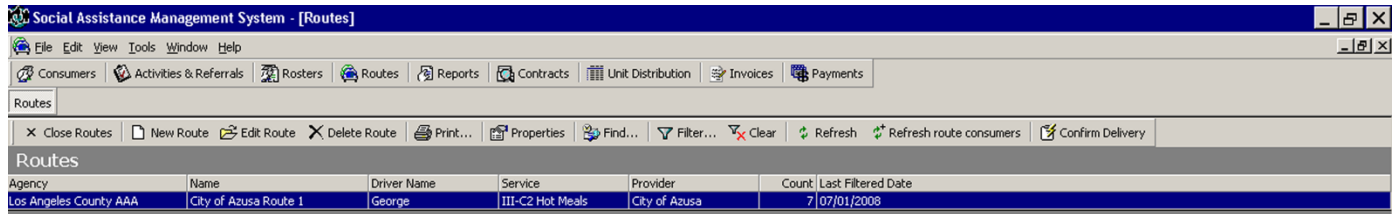You are now ready to print the Route.

Step Four: Printing the Route

There are many options for printing the Route. We will be covering the most common printing method here: **Compact, Landscape Routes**.

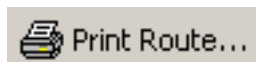1. In SAMS, Press the **Routes** button.

2. Highlight the Route you wish to print and double-click to open it.

3. Verify that the list of Consumers is in order and that everyone you expect to be on the Route is there.

4. Press the *Print Route* button.

5. The screen below shows the order in which the Print Routes screen should be filled out.

a) Choose the *Style of Route*. As mentioned previously, Routes (Compact, Landscape) is the most commonly used method. You may also make your choice of *Daily or Weekly* Routes here.

b) Choose the *Route Date*.

c) Choose what you would like to include in the Select to Include in Print Out section. You should check the "Directions" box if you have typed directions in the consumer record.

6. Next, you have two choices. You may click the "Preview" button to send the Route to the screen, or you may click the "Print" button to send the Route to the printer.

Troubleshooting Routes

Here are the two most common problems that will hold a Consumer off from a Route:

1.   The Consumer has no Municipality designated on the Consumer record.

The Municipality field is located in the Consumer record in the ***Details - Residential Address*** section, as shown below:

Residential Address	
Street 1	156 Graydonn
Street 2	
County	Los Angeles
Town	Monrovia
State	CA
ZIP Code	91016
Municipality	Route 01
Directions To Home	South to camino real right to graydon right to

2.   The Consumer has no Provider designated on the Consumer record.

The Provider field is located in the Consumer record in the ***Details - Providers*** section, as shown below:

	Is Default	Provider	Start Date	End Date	First Service Date	Last Service Date
General	☑	Santa Anita Family Services	06/24/2008			
Contacts						
Locations (2)						
Phones (1)						
User Fields						
Ethnic Races						
Care Enrollments (1)						
Co-Pay						
Care Managers						
Fund Identifiers (1)						
Providers (1)						
Caregivers						
Care Recipients						
Service Suspensions						